

# **Service Point Workflow Manual - SSVF**

## **Introduction**

This guide was created to assist users with the correct workflow process of entering data into Service Point for Baltimore County. All users must follow the exact order of these procedures, or else the data will not report properly. This resource was created with the understanding that the users reading this guide already have basic knowledge of Service Point.

## **Technical Support**

Please contact Jason Burns for technical assistance, trainings, custom reports, custom assessments, etc.

Phone: 443-208-1020 (Do not leave voicemails. If unavailable by phone, please email.)

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## **Service Point Login Web Address (Live Site)**

<https://www4.servicept.com/baltimoreco>

## **Service Point Login Web Address (Training Site)**

<http://www4.servicept.com/training/baltimoreco>

## **HMIS Resources Web Address**

Visit the Baltimore County HMIS website to obtain up to date HMIS information, forms, manuals, and data accuracy scores!

<http://www.baltimorecountymd.gov/hmis>

Remember the following order for data entry:

- 1. SEARCH**
- 2. COMPLETE INTAKE FORM (Back Date First!!!)**
- 3. HOUSEHOLD (if applicable)**
- 4. ROI**
- 5. ENTRY DATE & ENTRY TYPE (VA)**
- 6. SERVICE TRANSACTIONS (Click on Multiple Services)**
- 7. EXIT DATE (Update Intake Form First!!!)**

**MAKE SURE YOU ARE ENTERING DATA AS THE CORRECT VA PROGRAM BEFORE YOU BEGIN DATA ENTRY!!!**

**1. SEARCH** - Search for your client in ClientPoint to make sure your client is not already in the system. Search by First and Last Name only. If no matches are found, fill out the First Name, Last Name, and SS# only to create a new client.

**Search for Existing Client**

Search for client before adding a new client.

First  MI  Last  Suffix

SS#  -  -

Search Filter

☐ Exact Match?


☒ Search only active clients?

☐ Search only inactive/deleted clients?

☐ Search all clients?

**Note:** For clients with names that may be shortened or extended, search **ALL** possibilities. For example, if your client's name is "Bill Smith," search for "Bill Smith," "Will Smith," William Smith," etc.

**2. BALTIMORE COUNTY UNIVERSAL INTAKE FORM** - Once on the Profile page in Client Point, complete the Baltimore County Universal Intake Form. All of the questions in **BOLD RED** are required to have an answer. **\*BACK DATE FIRST!!!**

**Baltimore County Universal Intake Form** 

**Assessment Date**   :  AM

Have Valid Drivers License or State ID?  **H G**

ID#  **H G**

**Date of Birth**  (mm/dd/yyyy) **H G**

**Date of Birth Type**  **H G**

**Primary Race**  **H G**

**Note:** Even though some of the questions in **BOLD RED** may not pertain to your client (e.g., pregnancy, military, etc.), an answer is still required. If questions that are **not** in **BOLD RED** are relevant to your client, these questions must be also be answered. For example, if your client is homeless, all of the homeless questions must be filled out. If you are working with a client that already has this intake form filled out, be sure to review all questions and make necessary updates.

"Housing Status" field **must** be answered in the Baltimore County Universal Intake Form!

**Residence Prior to Program Entry**

**Housing Status**  **H G**

If "Don't Know" or "Refused" are selected as the Housing Status response, the client will not be reported in the report.


**3. HOUSEHOLD INFORMATION** - Complete the Household Information at the top of the Profile page, if applicable. **DO NOT COMPLETE THIS SECTION IF YOUR CLIENT IS SINGLE WITHOUT CHILDREN!!!** The system automatically assumes your client is single if the Household Information is not completed.

[Household Information - 0 Households - Click to Expand](#)

When creating a household, you **MUST** use "Household Data Sharing."

Household Data Sharing 

Add Household Data

 **4. ROI** - Complete the ROI. If applicable, you may complete the ROI for family members at the same time.

ServicePoint - Release of Info - Mozilla Firefox

https://www4.servicept.com/baltimoreco/scripts/svppopreleaseinfo.php

Release of Information - (Doe, Jane) Save Release Info Cancel

Household members

To include household members in this release of info, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

☒ \* Doe, Sam

Release of Info Data

Provider

Baltimore County Office of Community Conservation (#1)

Release granted?

Yes

Start Date

02/10/2009

End Date


02/10/2010

Documentation


Signed Statement from Client

Witness

**Note:** The ROI (Consent Form) is only valid for one year.

5.  **ENTRY/EXIT** - Add an **Entry** Date. If applicable, you may complete the Entry Date for family members at the same time. The "Type" of Entry should always be changed to "**VA**."

**Entry/Exit - (Burns, Jason)** Save and Close Save Cancel

**Household Data Sharing**  Add Household Data

**Household members**

To include household members in this entry/exit, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

☒ \* Burns, Ben

**Entry Data**

Provider: ServicePoint Training Site (#1)

Type: VA

Entry Date: 02/10/2009  :

6. **SERVICE TRANSACTIONS** – Click on "**Multiple Services**". If applicable, you may complete the Service Transaction for family members at the same time. Only the fields in yellow need to be completed.

**Services** Add Another Cancel All Clear All Save And Exit Exit

**Household members**

To include household members in these services, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

☒ \* Doe, Sam

**Multiple Services**

**Warning:** Be sure to select the correct provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be reentered.

Provider: Baltimore County Department of Social Services: Ex-Offender Housing (#6175)

**Service List**

# of Services 1 Service Rent Payment Assistance

Start Date 02/10/2009 10 : 34 AM End Date 02/10/2009 10 : 34 AM

HPRP Housing Relocation & Stabilization Service Provided -Select-

HPRP Financial Assistance Type Rental assistance

Source 1 -Select- Cost of Service 1

Source 2 -Select- Cost of Service 2

# of Units 1 Unit Type -Select- Cost of Unit

Status Closed

Cancel Clear

**Note:** You may only select from the dropdown list from either "HPRP Housing Relocation & Stabilization Service Provided" or "HPRP Financial Assistance Type," not both. You will know which one to select based on the selection from the "Service" dropdown menu.



7. **Entry/Exit** – Add an **Exit** Date. If applicable, you may complete the Exit Date for family members at the same time. **\*UPDATE INTAKE FORM FIRST!!!**

Entry/Exit - (Doe, Jane)

Save and Close

Save

Cancel

#### Overview

Name	Entry Date	Exit Date	Reason Leaving	Destination
▶ Doe, Jane	02/10/2009			
Doe, Sam	02/10/2009			

#### Exit Data

Exit Date	02/10/2009 10 : 35 AM
Reason for Leaving	Completed program
If other, specify	
Destination	Permanent housing for formerly homeless (S+C, SHP, etc.)
If other, specify	
Tenure	-Select-
Subsidy	-Select-
Notes	

To update household members' exit data also, click on the box beside each name.

☒ Doe, Sam